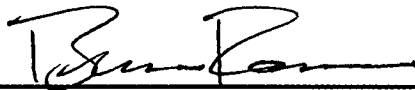


# **QUANTITATIVE EVALUATION SYSTEM III**

## **MANUAL OF PROCEDURES FOR ADMINISTERING THE SYSTEM**

### **MONTGOMERY COUNTY GOVERNMENT**



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**APPROVED: CHIEF ADMINISTRATIVE OFFICER**

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## TABLE OF CONTENTS

	Page
I. Introduction.....	1
A. Coverage.....	5
B. Authority.....	5
C. Responsibility.....	5
II. Classification Process.....	5
III. Procedures for Evaluation of Occupational Classes.....	9
A. Obtaining Proper Documentation of Factor Data.....	9
B. Determining Primary and Substantial Duty.....	9
C. Assigning Factor Levels.....	9
D. Determining Frequency.....	10
E. Evaluating Supervisory Responsibilities.....	11
F. Assigning Point Values.....	12
G. Point-to-Grade Conversion Table.....	14
IV. QES III Factor Definitions.....	15

# **QUANTITATIVE EVALUATION SYSTEM III**

## **(QES III)**

### **ADMINISTRATIVE MANUAL**

#### **I. INTRODUCTION**

This manual for administering Montgomery County Government's Quantitative Evaluation System III (QES III) sets forth procedures for applying the system, and provides the factor level definitions, guides, applications, factor points, and point-to-grade conversion table. The manual is intended to serve as an operational guide for the Office of Human Resources staff, and for others who may require or desire a detailed understanding of the system and how it is applied.

The QES III is a quantitative, point-factor job evaluation system for determining the grade of occupational classes. The system contains ten factors; nine factors are common to all jobs and one is used to measure supervisory responsibilities. Each factor is divided into levels which define the various degrees of the factor. Points are assigned to each level, which increase in value for successively higher levels of the factor. Classes are evaluated by determining the level of each factor appropriate to the class, recording the corresponding point value, and adding all points to arrive at a total point value for the class. The total point value is converted to a grade in a salary schedule by referring to a Point-to-Grade Conversion Table.

The County Government's original QES was developed in 1980 by Hallcrest-Craver, Incorporated. In 1986, in response to pay equity concerns, the consulting firm of Hubbard & Revo-Cohen, Incorporated, was hired by the County to conduct a diagnostic study of QES and recommend revisions and improvements to the system. As a result of the diagnostic study, the County Executive directed in May, 1986, that a Senior Management Job Evaluation Task Force and an Employee Job Evaluation Task Force review the Consultants' recommendations and make appropriate modifications to QES; some additional modifications were later suggested by the consultants. As a result, QES was revised to incorporate these recommendations and was approved by the Chief Administrative Officer for application by a consultant to the County's occupational classes. After completion of this effort, further revisions to the system were made at the recommendation of the consultant.

Principal modifications made in 1986 to the original QES which resulted in QES II included the following:

- A new job evaluation factor - Public Service/Assistance - has been added to recognize and credit direct "hands-on" care or assistance to members of the public, who may be called "clients." The Contacts factor was then revised to distinguish the differences between these two factors and ensure against double-crediting. (Specifically, credit for interactions with others which are of a similar nature, purpose and level may only be credited under one factor – either Contacts or Public Service/Assistance.
- Revision to the Working Conditions (Working Environment and Hazards) and Physical Demands factors to provide varying credit for occasional occurrence of the factor (greater

than 25% of the time but less than 50% of the time) and recurring occurrence of the factor (50% or more of the time);

- Revision to language of Working Conditions (Working Environment and Hazards) and Physical Demands factors to recognize previously unspecified job characteristics of female-dominated classes. For example:
  - Working Environment includes reference to exposure to human/animal waste or bodily fluids and the requirement to respond to life-threatening emergencies;
  - Hazards includes reference to abusive, aggressive and unpredictable behavior from clients or the public and exposure to contagious disease;
  - Physical Demands credits physical dexterity, including fine-finger movement required in production-oriented operation of keyboard devices.
- Revision to the Supervision Exercised factor to credit supervision of two or more regularly scheduled full-time workers or the equivalent.

As a result, QES II met the needs of Montgomery County Government for a single, bias-free job evaluation system that could be applied fairly to all of the County Government's merit system occupational classes. To help achieve this objective, the factors and definitions were carefully designed to eliminate, to the extent possible, ambiguity and potential bias in its

language and terms. As a further aid, each factor level definition was accompanied by guide and application statements that explained or illustrated how the factor was to be applied.

In 2004, the Office of Human Resources determined that QES II needed to be reviewed and updated. A consulting firm, Analytic Solutions, was hired to conduct this review and to develop QES III. This revision of QES II is intended to bring the system up to date by addressing obsolete references and terms, and to enhance its usefulness by removing ambiguities, sharpening its concepts and language, and to improve its internal structure by ensuring that factor concepts progress logically from level to level. No change has been made in the point values assigned to the factors or in the Point to Grade Conversion Table. Careful checking of the revised factor definitions has found no change in the way they have been applied in the past, thus ensuring that its continued use will bring the same valid and reliable results.

Job evaluation is not an exact science. QES III is an evaluation tool that provides a systematic guide to judgment, but it is no substitute for thorough job knowledge and job analysis by trained evaluators who have both good job documentation and knowledge of a wide variety of occupational groups. To the extent that the system produces results which are accepted as reasonable and sound, the system may be said to be valid. To the extent that the system produces consistent results in the hands of different evaluators who are trained job analysts, at different times, it will be reliable. This manual provides instructions and guides to help ensure that these objectives will be achieved.

## **A. COVERAGE**

QES III is applied to merit system classes in the Montgomery County Government which are subject to the classification authority of the Chief Administrative Officer. Some classes or individual positions may be exempt from coverage in accordance with provisions of the County Charter, Merit System Law and Personnel Regulations, or collective bargaining agreements.

## **B. AUTHORITY**

The adoption and implementation of QES III is authorized by Section 9-3(C) of the Personnel Regulations.

## **C. RESPONSIBILITY**

Responsibility for administering QES III has been delegated to the Director, Office of Human Resources.

## **II. CLASSIFICATION PROCESS**

The classification process consists of the following two separate activities:

1. The evaluation of occupational classes and their assignment to pay grades on a salary schedule, which is accomplished through application of the quantitative job evaluation system as part of the occupational class study process or when a new occupational class is established; and
2. The assignment or classification of individual positions to occupational classes,

including new positions, which is accomplished through individual position classification studies and reference to class specifications. QES (all versions) is not designed for and is not used for individual position evaluations.

The following classification terms should be understood and properly applied to ensure correct results with the system:

<b>Position</b>	A position is a set of duties and responsibilities assigned or delegated by management to be performed by one individual.
<b>Occupational Class</b>	A class is a single stand-alone position, or two or more positions, which are similar with respect to the nature and level of duties and responsibilities. Wherever possible, the classification plan attempts to define broad "generic" classes, to facilitate recruitment and employee mobility.
<b>Occupational Series</b>	A series consists of two or more classes similar as to type of work performed, but differing as to level of difficulty and responsibility. The different levels within an occupational series constitute the normal lines of promotion within an occupation, including proficiency levels, which are provided as learning and developmental classes leading to a full-performance level.
<b>Grade</b>	A grade designates a salary range on a County Government salary schedule which applies to classes of positions. Although different with respect to kinds of work, classes assigned to the same grade are considered equivalent in value as determined by their evaluations under QES III.



## **Job Analysis**

Job analysis is the systematic study of a position or class. When applied to position classification, job analysis is concerned with a position's duties and responsibilities, reporting relationships, skill requirements, working conditions, and other elements that govern its allocation to a particular class. It involves the collection and comparative analysis of facts about positions to identify their principal characteristics. When these meet existing classification standards (class specifications), positions are allocated to established classes in the organization's classification plan, taking the titles and salary grades established for other positions in the same classes. When a position does not fit an established class, a new class is created; new classes must be evaluated using QES III to determine their salary grades.

When applied to the process of evaluation of an occupational class, job analysis is concerned with comparing the work of a class to the criteria established for determining the relative value of classes. It involves the application of defined evaluation factors to discrete elements or aspects of the work. The factor levels that match most closely are assigned to the class and the individual factor levels totaled to obtain a total point score for the class. This score provides an objective measure of the value of each class, which can then be converted to a salary grade using an approved point-to-grade conversion table.

## **Class Specification**

Class specifications are written statements describing the duties, responsibilities, and qualification requirements of a class of positions. They establish a single title to be used for all positions in the class, define the principal characteristics of the work, provide examples of duties, list the knowledges, skills and abilities required to perform the work, and state the minimum qualifications for initial appointment or promotion to positions in the class.

Similar to previous versions of QES, QES III is designed to evaluate the skill, effort, responsibility and working conditions of occupational classes and results in the assignment of those classes to grades on a salary schedule. The ten factors of QES III (unchanged from QES II) are:

1. Knowledge Required
2. Supervisory Controls
3. Guidelines
4. Complexity
5. Scope and Effect
6. Contacts
7. Public Service/Assistance
8. Working Conditions
  - A. Working Environment
  - B. Hazards
9. Physical Demands
10. Supervision Exercised
  - A. Nature of Work Direction
  - B. Personnel Authority
  - C. Number Supervised

Definitions describing the various levels for each of the factors follow later in this manual. Accompanying the factor level definitions is guide material describing the intent of each

factor definition and examples of specific applications to different kinds of work.

### **III PROCEDURES FOR EVALUATION OF OCCUPATIONAL CLASSES**

#### **A. OBTAINING PROPER DOCUMENTATION OF FACTOR DATA**

Current and accurate data on each of the job evaluation factors must be obtained before a class can be evaluated. For most purposes, data can be in the form of a current class specification and/or other written documentation of the work performed. In addition, information obtained from audits and supervisory interviews, organization charts, functional statements, and other pertinent sources such as budget documents is consulted during the evaluation.

#### **B. DETERMINING PRIMARY AND SUBSTANTIAL DUTY**

The *primary duty* is defined as those tasks, duties and activities which together constitute an identifiable assignment that represents at least 50% of the work in a class. The primary duty is the normal basis for evaluation. *Substantial duty* is defined as an assignment which comprises at least 25% of the work of a class. Such assignments may be considered as the basis for evaluation when such duties are paramount in influence and weight, are regularly assigned on a reasonably frequent basis, and are not of an emergency, incidental, or temporary nature.

#### **C. ASSIGNING FACTOR LEVELS**

As stated above, the primary and substantial duties of each occupational class are the

basis for the QES III evaluation. Each of the factors is evaluated separately. When there is variation within a class with respect to duties, responsibilities, working conditions, or other requirements of the class, the factor level that best evaluates the work of the class is awarded.

A factor level awarded must be fully equivalent to the overall intent of the definition. The guide and application material that accompanies the factor level definitions aids in discerning the overall intent of that factor level and in distinguishing between factor levels. A factor must be present in a class on a regular and recurring basis in order to be credited; however, in unusual cases a factor level is an absolute and recurring requirement of the job which is documented in the class specification and/or is a bona fide occupational qualification for recruitment. In such cases, the factor level award may be made regardless of the time spent in the activity.

#### **D. DETERMINING FREQUENCY**

Frequency of occurrence must be determined for the following factors:

Factor 8: Working Conditions (both subfactors 8A and 8B)

Factor 9: Physical Demands

Frequency of occurrence refers to actual occurrence of the work characteristic or requirement and is determined as follows:

##### **Regularly Recurring**

The factor is present in the work at least 50 percent of the work time (based on an 8-hour work day, 40-hour work week). Regularly may mean hourly, daily, or weekly; it implies sustained action, or actions repeated at frequent intervals.

### **Occasionally Recurring**

The factor is present in the work at least 25 percent but less than 50 percent of the work time (based on an 8-hour work day, 40-hour work week). It may occur periodically such as monthly, quarterly, or annually, or at irregular intervals. Note, however, that in unusual cases, if the factor is an absolute and recurring requirement of the job which is documented in the class specification, and/or is a bona fide occupational qualification for recruitment, "occasional" credit may be given regardless of the time spent.

The letters "R" and "O" are used to designate the respective point values for Regularly Recurring and Occasionally Recurring.

## **E. EVALUATING SUPERVISORY RESPONSIBILITIES**

The Supervision Exercised factor is designed to avoid overlap with other factors, particularly Guidelines, Complexity, and Scope and Effect. Consequently, the definitions must be interpreted carefully to ensure that only the defined aspects of supervision are evaluated. Credit for policies and procedures, complexity of work, and its scope and effect, are recognized under other factors.

The Supervision Exercised factor is divided into three subfactors: Nature of Work Direction, Personnel Authority, and Number Supervised. This factor is applied to classes the majority of whose positions have supervisory responsibility for 2 or more regularly scheduled full-time workers or the equivalent.

**1. Regularly Assigned Duties**

Positions in a supervisory class must regularly be assigned supervisory responsibilities on a continuing basis, as distinct from project leaders who head temporary groups formed to perform a specific assignment of limited duration.

**2. “People” Supervision Distinguished from Functional Supervision**

The Supervision Exercised factor may only be applied to classes which directly supervise the work of other regularly assigned workers. Classes of positions which have responsibility for the proper operation of a process, procedure, system, or function, or for work of contractors, are considered to have functional supervision. Functional supervision is carried out through such activities as designing, monitoring, and reviewing, rather than directly supervising the performance of work. This type of supervision is recognized under the factors of Complexity and Scope and Effect, and does not constitute supervision of employees.

**3. Crediting Supervision Exercised for Deputies and Full Assistants**

Deputies to department heads and full assistants who share in supervising the entire work effort of the organization receive supervisory credit as follows:

- 1) Deputies to department heads receive level four of Work Direction.
- 2) Deputies and full assistants receive level three of Personnel Authority. Level four of this subfactor is reserved for department or agency heads, who have final authority and responsibility for personnel actions affecting their employees.

#### **F. ASSIGNING POINT VALUES**

Only the specific point values provided for each factor level may be used. Partial values, such as one-third, one-half, etc., may not be used in an attempt to give partial credit for a factor. The factor must be "fully equivalent" to the overall intent of the factor definition; this precludes the award of partial credit and thus the use of any partial point values.

## G. POINT-TO-GRADE CONVERSION TABLE

The following table is used to convert total evaluation points for a class into County pay grades.

**Point-to-Grade Conversion Table**

GRADE	POINTS
5	0 - 920
6	921 - 961
7	962 - 1003
8	1004 - 1047
9	1048 - 1093
10	1094 - 1141
11	1142 - 1191
12	1192 - 1244
13	1245 - 1298
14	1299 - 1355
15	1356 - 1415
16	1416 - 1477
17	1478 - 1542
18	1543 - 1609
19	1610 - 1680
20	1681 - 1754
21	1755 - 1831
22	1832 - 1911
23	1912 - 1995
24	1996 - 2083
25	2084 - 2174
26	2175 - 2270
27	2271 - 2369
28	2370 - 2473
29	2474 - 2582
30	2583 - 2695
31	2696 - 2814
32	2815 - 2937
33	2938 - 3066
34	3067 - 3201
35	3202 - 3341
36	3342 - 3488
37	3489 - 3641
38	3642 - 3801
39	3802 - 3968



#### **IV. Quantitative Evaluation System III - Definitions**

The Factor-Point Table (unchanged from QES II) and the detailed factor and level definitions for this revised version of the Montgomery County Government's QES (QES III) are presented on the following pages. Also presented are guides and illustrative applications for the different levels of each factor.

**QES III**  
**FACTOR DEFINITIONS, GUIDES AND APPLICATIONS**

**FACTOR 1: KNOWLEDGE REQUIRED**

This factor measures the nature and extent of information or facts, or grasp of a field of work (e.g., steps, procedures, practices, rules, policies, theories, principles and concepts) and the nature and extent of the skills needed to apply those knowledges. Knowledge may be acquired through formal education, self-study or experience. To be awarded a level under this factor, a knowledge, skill and ability must actually be required and applied in the work.

Level (Points)	Definition	Guide/Application
1 (255)	<p>Ability to follow oral instructions or demonstrations.</p> <p>OR</p> <p>Ability to perform unskilled manual tasks.</p> <p>OR</p> <p>Ability to perform specific tasks of a step by step nature.</p>	<p><u>Guide</u>            Intended to cover work that can be learned within a few hours or days and which requires no previous training or experience. Applies to trainees in support type occupations who typically perform tasks of a step by step nature.</p> <p><u>Application</u>            Sort, log, tally, or compare written materials or items: file materials alphabetically, numerically, or by date; do basic arithmetic, deliver materials.</p> <p>Operate photocopiers and microfilm readers; operate printers and keyboard devices for completing forms and producing short documents.</p> <p>Perform custodial cleaning of public buildings and facilities using hand, power operated, and commercial cleaning equipment.</p> <p>Control vehicular traffic and pedestrian movement at school and church crossings.</p>

**FACTOR 1: KNOWLEDGE REQUIRED (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>2 (295)</b></p>	<p>Knowledge of basic or commonly used rules, procedures, methods, or operations to perform limited, recurring assignments.</p> <p>OR</p> <p>Ability to operate standard keyboard devices to perform limited assignments where speed is not essential.</p> <p>OR</p> <p>Ability to perform manual work requiring training and practice.</p>	<p><u>Guide</u> Intended to cover work that requires limited training or prior experience. The work consists of a series of related steps, tasks or procedures that typically comprise a part of a process.</p> <p><u>Application</u> Compile, proof, and check written materials or items; file materials by readily recognized subject matter; receive and route visitors to appropriate offices; calculate discounts and extensions; issue or sell standard stock items or merchandise.</p> <p>Operate keyboard devices to enter and retrieve data and to produce forms, letters, short correspondence and similar documents. Operate production-type copiers, duplicators, automatic mail processing equipment.</p> <p>Fuel vehicles; perform cleaning/custodial duties in garage and surrounding motor pool areas.</p> <p>Store, locate, and retrieve materials in a warehouse.</p>

**FACTOR 1: KNOWLEDGE REQUIRED (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>3 (345)</b></p>	<p>Knowledge of a body of rules, procedures, methods or operations that typically comprise a complete process to perform the full range of standard assignments and to resolve recurring problems.</p> <p>OR</p> <p>Knowledge of basic procedures in a technical field to perform limited assignments.</p> <p>OR</p> <p>Ability to operate common shop tools and equipment in performing limited and/or repetitive operations.</p> <p>OR</p> <p>Ability to perform manual work involving the use of basic trade or craft methods and procedures.</p> <p>OR</p> <p>Ability to operate specialized motorized equipment and heavily loaded vehicles that require training and practice.</p> <p>OR</p> <p>Knowledge of the basic concepts and purposes of the field of public safety to perform limited assignments in the field.</p>	<p><u>Guide</u> Intended to cover work that requires job specific skills acquired through experience or through formal vocational training, during or after high school. High school diploma plus experience or considerable learning time on the job are typical requirements.</p> <p><u>Application</u> Carry out varied office support work for a unit or a group of professionals/administrators; use office automation hardware and software to: produce correspondence, reports, tables, spreadsheets and similar documents; maintain operating and financial records and files; process transactions; communicate and log communications with others; record appointments; maintain calendars; and format complicated documents. Identify and correct grammatical and spelling errors; draft routine replies to correspondence; locate information and incorporate into correspondence and reports.</p> <p>Obtain and verify information to process transactions including vendor claims, requisitions and purchase orders, tax bills, payments, license applications, inspection reports, citations, and permit requests. Maintain databases by entering, editing, and updating data files; generate reports and documents from a database.</p> <p>Follow specific procedures or detailed instructions to complete tasks such as: cataloging books; and ordering receiving, stocking, controlling and distributing equipment and supplies.</p> <p>Skill to set up, operate and adjust dental equipment and perform dental radiography work.</p> <p>Work as a helper or apprentice in plumbing, electricity, carpentry, HVAC, and auto body repair; perform rough carpentry, routine maintenance painting, simple masonry or minor automotive repairs.</p> <p>Perform semi-skilled manual labor work in the maintenance and repair of roads and property; operate tractor mowers, air compressors, masonry saws, augers, pavement breakers and trenchers; cut, thread and ream pipe; install traffic signs and signposts.</p> <p>Operate transit buses and trucks.</p> <p>Perform basic security work involving patrolling, equipment monitoring, desk assignment, and parking detail; perform entry corrections work.</p>

**FACTOR 1: KNOWLEDGE REQUIRED (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>4 (415)</b></p>	<p>Knowledge of an <b><i>extensive and specialized body</i></b> of rules, procedures, methods or operations, which typically comprise a complete system of procedures, to perform a wide variety of interrelated or nonstandard assignments and to resolve a wide range of problems.</p> <p>OR</p> <p>Practical knowledge of standard procedures in a technical field to perform work requiring an understanding of technical data or symbols, and/or to operate technical instruments.</p> <p>OR</p> <p>Ability to set up, operate and adjust specialized tools or equipment to perform standard operations.</p> <p>OR</p> <p>Knowledge of standard methods, procedures and practices of a trade or craft to perform a variety of less than full journey level assignments in the trade or craft.</p> <p>OR</p> <p>Ability to operate specialized motorized equipment requiring special training and extended experience.</p> <p>OR</p> <p>Knowledge of standard methods, procedures and rules of the field of public safety to perform varied assignments in accordance with standard practices of the occupation.</p>	<p><u>Guide</u> Intended to cover work that requires considerable prior experience or extended learning time on the job. Post high school training (e.g., AA degree) in technical or specialized subjects is typical minimum requirement or an equivalent combination of training and experience.</p> <p><u>Application</u> Provide office support services requiring specialized knowledge of unit operations; plan and organize support services for a unit; apply knowledge of a variety of technical procedures, rules, laws, and/or regulations to process transactions utilizing unit, County, State, and or Federal databases; track, identify, and resolve transaction processing problems; collect and process information from various sources; compile and organize data for reports; maintain fiscal records; monitor and record expenditures following accounting standards.</p> <p>Perform entry level work in engineering technician work; make calculations and draw plans; conduct limited traffic studies.</p> <p>Perform entry construction monitoring and inspection work to ensure contractor compliance with County standards, contract specifications and codes and regulations.</p> <p>Set up, adjust and operate mobile road marking equipment.</p> <p>Operate vehicles and/or highway construction and maintenance equipment including backhoes, front-end loaders, power shovels, graders, rollers, and similar specialized equipment; operate tractor trailer combinations.</p> <p>Provide security, care, order and discipline for a segment of the inmate population at a County correctional facility. Coordinate the enforcement of security rules and regulations and ensure appropriate security procedures are followed by others.</p>

**FACTOR 1: KNOWLEDGE REQUIRED (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>5 (510)</b></p>	<p>Knowledge of an administrative system (office, stores, personnel, etc.) to perform assignments requiring an understanding of the basic principles and concepts of the field and its methods and procedures; assignments are characterized by analysis of factual matters that are readily apparent and the application of systems of rules or procedures.</p> <p>OR</p> <p>Knowledge of the principles and concepts of a field of work or study, and ability to apply these to well-defined situations or to perform introductory assignments in the field.</p> <p>OR</p> <p>Knowledge of the methods, procedures and practices of a technical field of work to carry out well-defined projects.</p> <p>OR</p> <p>Knowledge of the methods, procedures and practices of a trade or craft to lay out and complete projects.</p> <p>OR</p> <p>Knowledge of maintenance and operations methods, procedures and practices to perform or oversee complete projects.</p> <p>OR</p> <p>Knowledge of standard, methods, procedures, rules and practices of the field of public safety to carry out well-defined operations and to resolve problems.</p>	<p><u>Guide</u></p> <p>Intended to cover work which requires knowledge of a subject matter field that is normally acquired through extended learning at a college or university or through a combination of experience and post-high school education such as: paraprofessional work in accounting, library sciences, planning, information technology, and general administration; skilled work in technical, trades or craft occupations; and intern work in any professional or administrative field. Work typically requires comparing and evaluating data or information, interpreting results, and taking action or making decisions after considering alternatives.</p> <p>Work systems involve several separate operations which are often performed by different persons and that together make up a system of work. Workers are able to perform all aspects of the system and to identify and correct problems in the system and explain how the system operates to others.</p> <p><u>Application</u></p> <p>Plan, organize and direct support services for an organization or function requiring knowledge of the organization's operations, policies and procedures. Perform all steps necessary to complete an accounting function such as a billing process from auditing and posting original transactions, balancing and reconciling accounts, resolving discrepancies, preparing billings, and preparing related reports and statements.</p> <p>Manage liquor store operations.</p> <p>Perform limited assignments, operations or procedures designed to provide practice in and understanding of the basic principles, concepts and methods of a professional or administrative field.</p> <p>Apply knowledge of recreation methods, practices, procedures, regulations, precedents and policies in administering recreational activities and facilitating the delivery of program services within a defined area of one or more recreational programs.</p> <p>Design and draft entire plans and specifications for limited projects; collect and analyze data from tests, surveys, maps, plans, or other sources and draw conclusions; construct, maintain, diagnose and repair electronic equipment.</p> <p>Perform skilled plumbing, electrical, carpentry, HVAC, mechanical and auto body repair work involving the installation, modification, troubleshooting and repair of diverse systems, facilities and equipment.</p>

**FACTOR 1: KNOWLEDGE REQUIRED (Continued)**

Level (Points)	Definition	Guide/Application
<b>5 (510)</b>		<p>Plan and supervise work schedules and general sequence of operations for a crew performing road construction and maintenance, right-of-way maintenance, specialty construction and maintenance (such as bridge rehabilitation), neighborhood clean ups, special event support and related projects; determine equipment, material and types of employee skills required and ensure that material is ordered and delivered to work sites; maintain records of cost of materials and labor hours for each project.</p> <p>Supervise all inmate confinement and control activities exercised by a team of Correctional Officers at a cluster of posts or in a specified area within a unit of a County correctional facility.</p> <p>Perform entry level rehabilitative correctional work providing counseling services to a segment of an inmate or offender population.</p>

**FACTOR 1: KNOWLEDGE REQUIRED (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>6 (635)</b></p>	<p>Knowledge of the theories, principles, and concepts of a field of work or study, and ability to perform standard, recurring assignments in the field.</p> <p>OR</p> <p>Knowledge of technical concepts, methods and symbols and use of technical instruments to plan and carry out a full range of projects.</p> <p>OR</p> <p>Knowledge of maintenance and operations concepts, methods, procedures and practices to perform work involving the planning and implementation of policies, procedures and systems.</p> <p>OR</p> <p>Knowledge of the methods, procedures, rules and practices of a specialized area in the field of public safety to perform a variety of standard and nonstandard assignments.</p>	<p><u>Guide</u></p> <p>Intended to cover work in a professional or administrative field that ordinarily requires a job related college degree (e.g., accounting, business administration, nursing, engineering, planning, computer sciences) and some experience in the field; or completion of a postgraduate course of instruction leading to a Master's degree. The level is also appropriate for classes that require a non-specific college degree with experience in the field. The level may also apply to classes for which no formal degree requirement exists, but which require some experience in the field and require knowledge of work concepts, methods or techniques, acquired through experience and study that are equivalent to a college degree.</p> <p><u>Application</u></p> <p>Apply commonly used methods, procedures, and practices in an administrative or professional field of work to organize and analyze information, recommend appropriate actions, correct standard problems, and explain well established procedures and methods to others.</p> <p>Apply knowledge of budgetary methods, procedures, and practices to tabulate, summarize and analyze preliminary budget data and to explain budget procedures to department/agency representatives. Troubleshoot technology performance and operational problems of complex operating systems; Install, monitor, test, maintain, diagnose and repair components of a county-wide emergency communication system including state-of-the-art computer controlled radio transmitter and receiver controllers, communications and data switching systems, pagers, microwave communications systems, base stations, repair networks, audio systems, and emergency power generating equipment.</p> <p>Perform construction inspection and monitoring work of the full range of county building and highway construction projects, to ensure compliance with all applicable codes and regulations and timely and quality completion of projects.</p> <p>Plan, prepare cost estimates for, and manage a variety of facility renovation, remodeling, repair, maintenance and installation projects performed by skilled trade contractors or County employees.</p> <p>Coordinate all inmate focused activities and processes that occur within multiple and diverse posts within a correctional facility during an assigned shift; ensure inmates participate in treatment programs; serve as shift unit commander.</p>



**FACTOR 1: KNOWLEDGE REQUIRED (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>7 (815)</b></p>	<p>Knowledge of the theories, principles and concepts of a field of work or study, and ability to perform a variety of difficult and complex work assignments that include <b><i>unusual and nonstandard</i></b> matters.</p> <p>OR</p> <p>Knowledge of technical concepts, methods and symbols to plan, design, coordinate and oversee large-scale technical projects or projects involving the development of new methods, approaches or procedures.</p> <p>OR</p> <p>Knowledge of maintenance and operations concepts, methods and practices to perform work involving the development of new methods, approaches or procedures.</p> <p>OR</p> <p>Knowledge of a wide range of methods, procedures, rules and practices of the field of public safety to perform difficult and complex work assignments.</p>	<p><u>Guide:</u> Intended to cover work requiring full proficiency in a professional or administrative field, which typically consists of varied assignments embracing unusual, nonstandard and difficult matters within the field; or work requiring wide knowledge of many different aspects of a field in order to develop policy recommendations.</p> <p><u>Application</u> Perform professional information systems technology work requiring expertise in specific software applications, programming languages, system hardware and/or emerging technology in order to determine requirements, and design, develop and implement components of new technology applications.</p> <p>Perform accounting/auditing work encompassing all or major parts of a financial system, including identifying problems and recommending appropriate solutions.</p> <p>Provide community health nursing services in all phases of health to individuals and their families.</p> <p>Review and analyze major legislative/budget programs and policies for the County Council.</p> <p>Perform design/construction project management work for major capital projects.</p> <p>Plan, organize and direct facilities and grounds maintenance services for a major center of County government facilities.</p> <p>Plan, oversee and resolve problems of fire suppression and emergency medical services for an assigned area.</p> <p>Plan, organize and direct a large section of a County correctional facility to include 24 hour responsibility for all activities within that section.</p>

FACTOR 1: KNOWLEDGE REQUIRED (Continued)

Level (Points)	Definition	Guide/Application
<p><b>8</b> <b>(1055)</b></p>	<p>Mastery of a professional or administrative field or breadth of professional and program knowledge to:</p> <p>Make decisions or recommendations significantly changing, interpreting or developing important public policies or programs.</p> <p>OR</p> <p>Apply experimental theories and new developments to problems not susceptible to treatment by accepted methods.</p> <p>OR</p> <p>Ability to plan, organize and direct administrative or professional activities involving the development and implementation of new programs, approaches and methods that affect many areas of the organization.</p>	<p><u>Guide:</u> Intended to cover work requiring advanced knowledge and competency in a professional or administrative field or significant breadth of knowledge in several fields. Work typically consists of unusually difficult matters that cannot be resolved through conventional techniques or approaches, or which have far-reaching significance on major County programs.</p> <p><u>Application</u> Represent the County Government in a specialized area of municipal law.</p> <p>Perform professional clinical psychologist work providing direct clinical services.</p> <p>Direct major administrative programs such as purchasing, employment, classification, and budget.</p> <p>Direct accounting, auditing, and revenue programs; direct major engineering programs or library services; advanced-level policy development and analysis work in support of the legislative process.</p> <p>Direct all programs and services at a County correctional facility.</p>
<p><b>9</b> <b>(1400)</b></p>	<p>Mastery of a field of work or study, and ability to perform authoritative work in <b>determining</b> the nature of the functions, programs and services to be provided for major County programs.</p> <p>OR</p> <p>Comprehensive knowledge of a professional field requiring extended education, training and certification such as medicine to perform highly responsible work in the field.</p>	<p><u>Guide:</u> Intended to cover work requiring exceptional grasp of a professional or administrative field, and which typically consists of highly technical and specialized matters requiring extended training and experience to master, or a broad range of subject matter, issues and policies which must be understood and dealt with. The work is critical to the success of essential County programs.</p> <p><u>Application</u> Provide direct medical and psychiatric treatment services to clients</p> <p>Provide wide-ranging program guidance and staff assistance to the County Chief Administrative Officer.</p> <p>Direct major County health programs or legal services.</p>

## FACTOR 2: SUPERVISORY CONTROLS

This factor covers the nature and extent of direct or indirect controls exercised by the supervisor, the employee's responsibility, and the review of work. Controls are exercised by the supervisor in the way assignments are made, instructions are given to the employee, priorities and deadlines are set, and objectives and boundaries are defined. Responsibility of the employee depends upon the extent to which the employee is expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing priorities and defining objectives. The degree of review of completed work depends upon the nature and extent of the review -- e.g., close and detailed review of each phase of the assignment; detailed review of the finished assignment; spot-check of finished work for accuracy; or review only for adherence to policy.

Level (Points)	Definition	Guide/Application
1 (75)	The supervisor makes specific assignments, issuing clear, detailed, and specific instructions. The employee works as instructed and consults with the supervisor as needed on all matters not specifically covered in the original instructions. For all positions, the work is closely controlled. For some positions, the control is through the structured nature of work itself; for others, it may be controlled by the circumstances in which it is performed. In some situations, the supervisor maintains control through review of the work which may include checking progress or reviewing completed work for accuracy, adequacy, and adherence to instructions and established procedures.	<p><u>Guide</u> Intended to cover learner and trainee situations in office support, technical, and labor and trades classes where assignments are given primarily for the purpose of introducing the worker to the basic aspects of the work. Specific instructions are provided for each task and operation to be performed, and the worker has little or no responsibility to determine the sequence of work.</p> <p>The work is reviewed in detail or the work process contains inherent controls which effectively prevent inaccurate or unacceptable work from being performed. In such cases, review may be intermittent and in some situations, may actually be some distance removed from the work site.</p> <p><u>Application</u> Trainee, apprentice, and learner classes in office support, technical, and labor and trades classes in which the work is closely controlled.</p>
2 (90)	The supervisor provides continuing or individual assignments by indicating generally what is to be done, limitations, and quality and quantity expected, deadlines, and priority of assignments. The supervisor provides additional, specific instructions for new, difficult, or unusual assignments including suggested methods or advice on source material available. The employee uses initiative in carrying out recurring assignments independently without specific instruction, but refers deviations, problems, and unfamiliar situations not covered by instructions to the supervisor for decision or help. The supervisor assures that finished work and methods used are technically accurate and in compliance with instructions or established procedures. Review of the work increases with more difficult assignments if the employee has not previously performed similar assignments.	<p><u>Guide</u> Intended to cover recurring work in which the sequence of work and methods are set, OR varying work assigned by an employee's supervisor who furnishes specific guidance and instructions concerning work methods and procedures to be used, time frames for completion of work steps, and scope and limitations of new and continuing assignments.</p> <p>The work is reviewed to ensure that results are accurate and that procedures used are correct.</p> <p><u>Application</u> Classes covering experienced workers in technical and labor and trades areas, and learners in professional and administrative classes, in which the worker has immediate access to a supervisor or a senior worker for guidance, or the sequence of work and methods used are usually determined by a supervisor or the work process.</p>

**FACTOR 2: SUPERVISORY CONTROLS (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>3 (115)</b></p>	<p>The supervisor makes assignments by defining objectives, priorities, and deadlines; and assists employee with unusual situations which do not have clear precedents. The employee plans and carries out the successive steps and handles problems and deviations in the work assignment in accordance with instructions, policies, previous training, or accepted practices in the occupation. Completed work is usually evaluated for technical soundness, appropriateness, and conformity to policy and other requirements. The methods used in arriving at the end results are not usually reviewed in detail.</p>	<p><u>Guide</u> Intended to cover situations in which workers who are proficient in the work proceed on their own to plan daily and ongoing work effort, independently arranging the sequence of work; obtaining needed materials or supplies, data or information; and selecting appropriate methods and procedures and varying these as necessary to treat different situations. Unusual and non-standard matters which do not have clear precedent are referred to supervisors or a senior worker. At this level, the worker has significant control over how the work is performed.</p> <p>Completed work is often subject to internal or external checks and is reviewed in terms of accuracy and acceptability. Some work efforts cannot be reviewed in the conventional sense such as service, advice, and counseling, but the techniques, methods and approaches used would normally be reviewed for conformity to policy and established requirements.</p> <p><u>Application</u> Trained and experienced workers in all fields carrying out standard assignments, such as:</p> <p>Procurement Specialists who plan and carry out all steps needed to purchase goods and services for the County, which involves planning and carrying out information gathering and analysis activities that include consideration and application of County policies, procedures and regulations, and whose work is reviewed to ensure conformance with County policies and regulations;</p> <p>A Code Enforcement inspector who plans and conducts daily inspections, issues violation notices and citations in accordance with strict codes and regulations, and whose findings and written reports are reviewed for technical adequacy;</p> <p>A Nurse who assesses, plans and implements direct care to clients in accordance with established laws and community health nursing standards.</p>
<p><b>4 (150)</b></p>	<p>Overall objectives and resources available are set. The employee alone, or in consultation with the supervisor, develops the deadlines and work to be done. At this level, the employee having developed expertise in the line of work, is responsible for planning and carrying out the assignment, resolving most of the conflicts which arise, coordinating the work with others as necessary, and interpreting policy on own initiative in terms of established objectives. In most assignments, the employee determines the approach to be taken and the methodology to be used. The employee keeps the supervisor informed of progress,</p>	<p><u>Guide</u> Intended to cover situations in which workers (who have full technical responsibility for the work) independently determine and carry out all necessary steps to complete assignments, which often are long-term projects (2-3 months), subject to available resources and agreed-upon deadlines. This typically involves planning the work effort, identifying potential problems, resolving problems, coordinating with others outside the work unit, and determining the methods, procedures or approaches to be used. The worker effectively has full control over how the work is performed. Results of the work, such as recommendations, completed plans, products or services, are reviewed in terms of effectiveness in meeting objectives.</p>

**FACTOR 2: SUPERVISORY CONTROLS (Continued)**

Level (Points)	Definition	Guide/Application
	potentially controversial matters, or far-reaching implications. Completed work is reviewed only from an overall standpoint in terms of feasibility, compatibility with other work or effectiveness in meeting requirements or expected results.	<u>Application</u> Senior workers in all fields who have full technical responsibility for the work and who are frequently given long term assignments and projects or the most difficult work.
<b>5 (200)</b>	Assignments are stated in terms of <b>broadly defined missions or functions</b> ; work is normally performed under <b>administrative direction</b> with little or no technical guidance available. The employee is responsible for planning, designing, and carrying out the work independently. Results of the work are considered technically authoritative and are normally accepted without significant change. If the work should be reviewed, the review concerns such matters as fulfillment of program objectives, effect of advice and influence on the overall program, or the contribution to the field. Recommendations for new projects and alteration of objectives are usually evaluated for such considerations as availability of funds and other resources, broad program goals or priorities.	<u>Guide</u> Intended to cover situations in which workers, who have responsibility for broad programs, functions or activities, have full and final responsibility for the work effort. This typically involves determining all matters associated with completing work assignments, including what is to be done as well as how it is to be performed.  The work product or service is evaluated in terms of meeting broad program goals.  <u>Application</u> Managers of broad programs and functions who are responsible to administrative heads; or professionals who provide technically authoritative advice, such as physicians, psychiatrists and attorneys.

### FACTOR 3: GUIDELINES

This factor covers the nature of guidelines, the judgment needed to apply them, and the authority to depart from and to adopt guides. Guides include desk manuals, established procedures and policies, traditional practices, and reference materials such as dictionaries, style manuals, and engineering handbooks.

Individual jobs in different occupations vary in the specificity, applicability, and availability of the guidelines for performance of assignments. Consequently, the constraints and judgmental demands placed upon employees also vary. For example, the existence of specific instructions, procedures and policies may limit the opportunity of the employee to make or to recommend decisions or actions. However, in the absence of procedures or under broadly stated objectives, employees in some occupations may use considerable judgment in researching and developing new methods.

Guidelines should not be confused with the knowledges described under Factor 1. Guidelines either provide reference data or impose certain constraints on the use of knowledges. For example, in the field of engineering, for a particular design application, there may be three or four standard approaches set forth in a technical manual. An engineer is expected to know these approaches. However, in a given environment, the policy may be to use only one of the approaches, or the policy may state specifically under what conditions which approach may be used.

Level (Points)	Definition	Guide/Application
1 (75)	Specific, detailed guidelines covering all important aspects of the assignment are provided to the employee. The employee works in strict adherence to the guidelines; deviations must be authorized by the supervisor.	<u>Guide</u>  Intended to cover work that follows set procedures allowing no choice by the employee on how the work is performed. Procedures may be in the form of written guides or instructions, or learned, but cannot be deviated from without prior approval.  <u>Application</u>  Work that follows prescribed procedures or rules, such as:  Mail and file clerks, and persons who work closely with others as learners, trainees or assistants;  Operators of equipment that requires strict observance of operating instructions;  Routine maintenance workers following procedures and methods that are clearly indicated.

**FACTOR 3: GUIDELINES (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>2 (90)</b></p>	<p>Procedures for doing the work have been established and specific guidelines are available. The employee uses judgment in locating, selecting, and applying the appropriate guidelines, references, and procedures to specific cases. Significant, proposed deviations or situations to which existing guidelines cannot be applied typically are referred to the supervisor. At this level the employee may also determine which of several authorized alternatives to use.</p>	<p><u>Guide</u></p> <p>Intended to cover work that is performed according to several different procedures and guides, which must be known (or referenced) by the employee. The employee selects and applies the appropriate law, rule, regulation, policy, procedure or method to varying situations or cases encountered in the work.</p> <p><u>Application</u></p> <p>Work that consists of varied situations requiring the application of different procedures or methods, such as:</p> <p>Office workers who utilize office productivity software to produce a variety of documents in different formats;</p> <p>Equipment operators who adjust equipment, or use different pieces of equipment, to work on different items;</p> <p>Paraprofessionals in accounting who utilize different procedures depending on the nature of the transaction or account;</p> <p>Persons who enforce or apply a variety of laws or regulations;</p> <p>Maintenance work consisting of different types of problems or repairs.</p>
<p><b>3 (115)</b></p>	<p>Guidelines are normally available, but are not completely applicable to the work or do not cover new or unusual situations encountered in the work. The employee uses ingenuity and resourcefulness to modify, adapt, or deviate from existing guides (such as precedents, conventional methods and procedures, and normal practices). The employee analyzes results and recommends changes.</p>	<p><u>Guide</u></p> <p>Intended to cover work that consists of situations or cases which are unusual or out of the ordinary and do not fit existing guides. The employee is required to handle such situations by modifying procedures or adopting different approaches or methods. Employees recommend changes to existing guides based on a review of cases or experience.</p> <p><u>Application</u></p> <p>Work that deals with unusual, nonstandard situations and in which the employee is authorized to deviate from existing guides to resolve matters, such as:</p> <p>Accountants who decide on how to treat nonstandard entries or transactions;</p> <p>Office workers who identify ways to utilize technology to improve the efficiency and effectiveness of office operations;</p> <p>Workers who identify and implement new ways to repair electrical, electronic or mechanical malfunctions;</p> <p>Budget analysts who develop alternative methods of analysis to handle unusual or new situations;</p> <p>Security supervisors who develop new procedures and policies for monitoring program performance.</p>

**FACTOR 3: GUIDELINES (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>4 (150)</b></p>	<p>Administrative policies and precedents are applicable but are stated in general terms. Guidelines for performing the work are scarce or of limited use. The employee uses initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods or criteria, or to propose new policies.</p>	<p><u>Guide</u></p> <p>Intended to cover work that is performed within an established framework of existing guides which apply generally to the work, but which do not cover specifically most of the substantive, technical or operational processes involved. The employee, through research, analysis or own knowledge, devises appropriate guides (such as new approaches, methods or procedures) to be used by the employee (and others) in the work.</p> <p><u>Application</u></p> <p>Work that deals with new or changing situations for which the employee is responsible for developing and applying appropriate guides, such as:</p> <p>Legislative staff professionals engaged in policy development concerning a variety of issues before the County Council;</p> <p>Supervisors of programs subject to changing requirements or new technologies;</p> <p>Workers engaged in highly creative efforts to develop new standards, policies, procedures or methods.</p>
<p><b>5 (200)</b></p>	<p>Guidelines are broadly stated (e.g., broad public policy statements or basic legislation) and require extensive interpretation. The employee uses considerable judgment to interpret the intent of the guides and to develop specific directives, rules, regulations, policies, and procedures for application to the work. The employee is recognized as the technical authority on the interpretation of guides in highly unusual cases.</p>	<p><u>Guide</u></p> <p>Intended to cover work that is subject only to very general or broad guides. The employee is granted full latitude to interpret and to develop specific rules, regulations, policies and procedures to apply to the work or to develop specific strategies to accomplish complex work assignments.</p> <p><u>Application</u></p> <p>Work encompassing a program, function, or activity operated under general laws or policies which require the employee to develop all or most of the policies, rules, and procedures covering the work; advanced analytical work in legislative policy development and implementation; advanced analytical work in information technology that results in new procedures, methods, and/or policies that affect how work is done in many County Departments.</p>



#### FACTOR 4: COMPLEXITY

This factor covers the nature, number, variety and intricacy of tasks, steps, processes or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

Level (Points)	Definition	Guide/Application
<b>1 (240)</b>	The work consists of tasks that are clear cut and directly related. There are few if any choices to be made in deciding what needs to be done. Actions to be taken or responses to be made are readily discernible.	<u>Guide</u>  Intended to cover work in which the employee recognizes what is to be done through simple observation of readily apparent situations.  <u>Application</u>  Work that consists of a few, clearly related steps such as:  Filing materials by date or reference code;  Producing typed materials such as form letters, registration cards or short correspondence;  Cleaning buildings or grounds.
<b>2 (290)</b>	The work consists of duties involving related steps, processes or methods. The decision regarding what needs to be done involves various choices requiring the employee to recognize the existence of and differences among a few easily recognizable situations. Actions to be taken or responses to be made differ depending on the source of information, the kind of transactions or entries, or other differences of a factual nature.	<u>Guide</u>  Intended to cover work in which the worker, through training or prior experience, recognizes the meaning of readily apparent differences in situations and acts accordingly.  <u>Application</u>  Work that consists of several related steps, processes and methods, and which requires the employee to vary responses or actions, according to differences in the work, such as:  Workers who check and verify data on forms, select appropriate applications and formats to produce different types of documents and identify and correct spelling and grammatical errors;  Security officers who monitor facilities using surveillance equipment to identify security breeches and determine appropriate courses of action;  Workers who operate machines and equipment that require close attention and adjustment, such as offset presses and chainsaws;  Maintenance workers who repair defects or malfunctions that are readily found.

**FACTOR 4: COMPLEXITY (Continued)**

Level (Points)	Definition	Guide/Application
3 (365)	<p>The work consists of duties involving a variety of processes and methods. The decision regarding what needs to be done depends on <b>analysis</b> of the subject, or issues involved in each assignment, and the chosen course of action may have to be selected from many alternatives.</p> <p>The work involves conditions and elements that must be identified and analyzed to discern interrelationships.</p>	<p><u>Guide</u></p> <p>Intended to cover work requiring analysis. Analysis assumes that the meaning, significance or interrelationships among data, situations or conditions are not clear, but must be identified through some systematic analytical procedure, such as: (1) assembling and categorizing facts or information; (2) examining the facts or information to ascertain their significance or meaning; and (3) determining what action to take.</p> <p><u>Application</u></p> <p>Work that involves problem-solving, planning and organizing, or making decisions after considering several factors, such as:</p> <p>Planning and organizing office support services for a large organization;</p> <p>Maintaining a system of accounts (or parts thereof) and preparing reports and statements describing the condition of accounts;</p> <p>Preparing plans, maps and drawings from survey notes, photos or sketches.</p>
4 (465)	<p>The work typically consists of varied duties involving a wide range of processes and methods, such as those relating to established practices of an administrative or professional field. Decisions regarding what needs to be done include the <b>assessment</b> of unusual circumstances, variations in approach, and incomplete or conflicting data. The work requires making many decisions concerning such things as interpreting of considerable data, planning of the work, or devising the methods and techniques to be used.</p>	<p><u>Guide</u></p> <p>Intended to cover work that consists of analysis and assessment of unusual or nonstandard matters or of data that is incomplete or contradictory. The employee decides what course to follow after considering the results of analysis (which is frequently only partial) and weighing the issues, factors or circumstances involved.</p> <p><u>Application</u></p> <p>Work that involves resolving unusual problems which conventional analysis only partially solves and which typically requires different analytical approaches to identify various alternatives, such as:</p> <p>Management and organization analysis to identify and recommend changes to improve productivity and design new work systems;</p> <p>Analysis and assessment of accounting practices in organizations in which there are unusual or highly variable accounting issues;</p> <p>Design of structures to control drainage;</p> <p>Management and delivery of library services;</p> <p>Provision of direct psychiatric/mental health nursing services;</p> <p>Analytical work in support of the development and implementation of legislation concerning a range of issues.</p>

**FACTOR 4: COMPLEXITY (Continued)**

Level (Points)	Definition	Guide/Application
<b>5 (605)</b>	The work consists of varied duties applied to a broad range of activities, including new and untried aspects, or requiring substantial depth of analysis, in an administrative or professional field. Decisions regarding what needs to be done involve major areas of uncertainty in approach, methodology, or interpretation and evaluation resulting from such elements as continuing changes in program technological development, unknown phenomena, or conflicting requirements. The work requires originating new techniques, establishing criteria, or developing new information.	<p><u>Guide</u></p> <p>Intended to cover work that consists of either a broad range of activities or a highly specialized area. The work is characterized by uncertain facts, data or information, rapid change, conflicting requirements or similar conditions. The employee must consider a broad range of issues, factors or circumstances whose importance and interrelationships are difficult to ascertain and assess; or must apply extensive forms of analysis combined with seasoned judgment to make decisions.</p> <p><u>Application</u></p> <p>Highly analytical work requiring the use of new techniques; work requiring consideration of a broad range of issues or requiring the use of technical analysis and judgment or the development of new information or criteria, such as:</p> <p>Directing accounting, auditing or revenue programs;</p> <p>Providing specialized psychological counseling to severely troubled individuals;</p> <p>Handling legal matters where the facts, issues and precedents are not clear;</p> <p>Developing and guiding through the political process legislation concerning a wide range of complex and sensitive issues;</p> <p>Developing, establishing, and maintaining materials standards for major County construction projects.</p>
<b>6 (800)</b>	The work consists of broad functions and processes of an administrative or professional field. Assignments are characterized by breadth and intensity of effort and involve several phases being pursued with the support of others within or outside the organization. Decisions regarding what needs to be done include largely undefined issues and elements, requiring extensive probing and analysis to determine the nature and scope of the problems. The work requires continuing effort to establish concepts, theories, or programs, or to resolve very complex problems.	<p><u>Guide</u></p> <p>Intended to cover work that consists of broad functions, programs or services which require extensive planning and coordination; and which require consideration of a very wide range of factors, issues, circumstances and elements to decide on courses of action.</p> <p><u>Application</u></p> <p>Work involving planning, coordination, and direction of broad County programs and functions;</p> <p>OR</p> <p>The performance of highly specialized work in resolving problems that are unprecedented or novel, such as directing County medical programs; providing expert analysis and recommendations concerning new IT technologies.</p>

## FACTOR 5: SCOPE AND EFFECT

This factor covers the purpose, breadth and depth of the assignment, and the effect of work products or services both within and outside the organization.

"Effect" measures such things as whether the work output facilitates the work of others, provides timely services of a personal nature, or impacts the adequacy of programs. Only the effect of properly performed work is to be considered.

NOTE: Functional supervision OF PROFESSIONAL SERVICES CONTRACTORS is credited under this factor.

Level (Points)	Definition	Guide/Application
<b>1 (165)</b>	The work involves the performance of specific, routine operations that include a few separate tasks or procedures. The work product or service facilitates the work of others within the unit; however, it has little impact beyond the immediate organizational unit.	<u>Guide</u> Intended to cover work of a basic support type that helps or assists in the activities or operations of the immediate organizational unit.  <u>Application</u> Work that primarily facilitates internal processes or to aid, assist or help others performing this work, such as: Filing, typing, operating office or shop equipment; Helping skilled trades or craft workers.
<b>2 (205)</b>	The work involves the execution of specific rules, regulations or procedures and typically comprises a complete segment of an assignment or project of broader scope. The purpose of the work is to help ensure the accuracy, reliability, or acceptability of the work of the unit. The work product or service typically is of a support nature that contributes to further processes within or outside of the unit.	<u>Guide</u> Intended to cover work that directly contributes to the product or service of the unit.  <u>Application</u> Work that typically consists of a complete assignment which is part of a larger area of work, such as: Office workers who provide office support services to a unit; Library assistants who help patrons and maintain and update databases; Health technicians who administer tests and obtain and record patient health history information.

**FACTOR 5: SCOPE AND EFFECT (Continued)**

<b>Level (Points)</b>	<b>Definition</b>	<b>Guide/Application</b>
<b>3 (255)</b>	The work involves investigating, analyzing and resolving a variety of conventional problems, questions or situations in conformance with established criteria. The purpose of the work is to ensure the proper design or operation of a system, program or work process, the products of which typically represent the final product or outcome of the system, program or work process to which the worker is assigned. The work product or outcome affects the adequacy of such activities as field investigations, testing operations, or research conclusions, the social, physical, or economic well-being of persons.	<p><u>Guide</u></p> <p>Intended to cover work whose primary purpose is to provide the main product or service of the work unit or system or to ensure the proper production of products or services by others.</p> <p><u>Application</u></p> <p>Work that involves carrying out a range of conventional assignments within a professional or administrative field, in public service, or in maintenance work, such as:</p> <p>Buyers executing purchase orders;</p> <p>Librarians developing book collections;</p> <p>Engineers designing standard structures or facilities;</p> <p>Community health nurses coordinating client care services;</p> <p>Managing and monitoring professional services contracts of moderate scope, expenditure and effect.</p>
<b>4 (325)</b>	The work involves establishing criteria; formulating projects; assessing program effectiveness; thorough analysis of a variety of complex issues; or investigating or analyzing a variety of unusual conditions, problems or questions. The purpose of the work typically is to ensure that programs, functions and services achieve their desired objectives by assessing results, establishing/changing policies and procedures, or devising new approaches. The service or work project affects a wide range of community activities, or the operation of other governmental units.	<p><u>Guide</u></p> <p>Intended to cover work that involves planning, organizing and directing a program, function or service; or dealing with problems, situations or conditions that establish precedents, standards, or policies affecting a wide range of activities.</p> <p><u>Application</u></p> <p>Work that involves managing and monitoring professional services contracts of major scope, expenditure and effect; ensuring that the objectives of a program, service or function are being met; or resolving unusual problems that have wide impact, such as :</p> <p>Social work supervisors;</p> <p>Nurse administrators;</p> <p>Budget analysts presenting, in public, policy recommendations as part of the legislative process;</p> <p>Engineers responsible for projects from conception through acceptance of designs, or from construction through final acceptance of completed work.</p>

**FACTOR 5: SCOPE AND EFFECT (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>5 (425)</b></p>	<p>The work involves isolating and defining unknown conditions, resolving critical problems or developing new theories; or developing, and presenting in public, analysis and recommendations concerning complex and sensitive issues. The purpose of the work is to resolve critical problems in the organization and delivery of government services. The work product or service affects the work of major aspects of administrative or technical programs or missions or the well-being of substantial numbers of people.</p>	<p><u>Guide</u></p> <p>Intended to cover work that involves designing, developing and implementing new programs, functions or services; or using new concepts, approaches or methods to resolve critical problems. The work has substantial effect on County-wide operations and/or the community.</p> <p><u>Application</u></p> <p>Work that involves directing a County program or developing and implementing solutions to critical problems, such as:</p> <p>Information Technology experts responsible for solving the most difficult systems problems of critical importance to County operations;</p> <p>Management of an economic development program that contributes to the development of the County Government's competitive posture for new investments and cooperative ventures which enhance the County's economic base;</p> <p>Legislative staff work affecting a broad range of sensitive and complex issues.</p>
<p><b>6 (560)</b></p>	<p>The work involves planning, developing and carrying out vital administrative or technical programs. The programs are essential to the missions of the jurisdiction or affect large numbers of people on a long-term, continuing basis.</p>	<p><u>Guide</u></p> <p>Intended to cover work involving the overall direction of major County programs, functions or services that directly affect the provision of government services to the community.</p> <p><u>Application</u></p> <p>Work involving the direction of major County programs, such as transportation and health.</p>

## FACTOR 6: CONTACTS

This factor refers to the requirement for the worker to deal with individuals or groups, such as representatives of organizations, legislative bodies, or community groups, in person or by telephone to accomplish work objectives. Consideration is given to the purpose of contacts, their difficulty, importance and level within or outside the organization.

NOTE: SEE DEFINITION FOR FACTOR 7: PUBLIC SERVICE/ASSISTANCE for the distinction between Contacts and Public Service/Assistance. CREDIT FOR INTERACTION WITH OTHERS WHICH IS OF A SIMILAR NATURE, PURPOSE AND LEVEL MAY ONLY BE CREDITED UNDER ONE FACTOR - EITHER CONTACTS OR PUBLIC SERVICE/ASSISTANCE.

Level (Points)	Definition	Guide/Application
1 (75)	Contacts are primarily with employees in the immediate work area or in related or support units and involve obtaining or giving facts or information concerning routine matters.	<u>Guide</u>  Intended to cover normal, everyday contacts among employees within an organization, which may be a unit, section, division or department. Contacts require normal courtesy in dealing with others and typically involve routine matters.  <u>Application</u>  Contacts are primarily with other employees and involve giving or exchanging information.
2 (90)	Contacts are with employees inside and outside of the immediate organization or with the general public, and involve exchanging information, explaining procedures, scheduling meetings, or providing instructions to facilitate a process or to provide a service.	<u>Guide</u>  Intended to cover contacts with others that aid, explain or facilitate a process or service; provide basic technical information; coordinate or facilitate activities such as integrating and coordinating work products or work schedules; resolving problems; or making arrangements for meetings, hearings or similar activities.  <u>Application</u>  Office workers who coordinate meetings and resolve schedule conflicts; Printers who exchange information with others concerning print job requirements.

**FACTOR 6: CONTACTS (Continued)**

Level (Points)	Definition	Guide/Application
<p><b>3 (115)</b></p>	<p>Contacts are with individuals, organizations or groups within or outside of the organization, and involve meeting and dealing with others to agree on courses of action or to solve operational or similar problems; or to provide advice related to area of operations.</p> <p>OR</p> <p>Contacts are with high-level officials within or outside of the organization <b>and</b> involve coordinating and/or facilitating the activities of the office of an elected or appointed official. Such activities include making arrangements with news media, setting up public appearances, arranging executive meetings, serving as liaison between high-level officials and others.</p>	<p><u>Guide</u></p> <p>Contacts require significant interactions with others, highly developed communications skills, skill in presenting ideas and technical information or addressing groups. Contacts may involve differences which the worker is expected to resolve.</p> <p><u>Application</u></p> <p>Interactive contacts to facilitate accomplishment of projects or management of programs, services or activities for which the worker is responsible: provide technical advice; resolve operating problems; provide classroom instruction. Examples are:</p> <p>An information technology specialist who meets with representatives of other departments to develop a plan for upgrading or resolving technology issues;</p> <p>A property manager who meets with contractors to resolve problems encountered in renovation of buildings;</p> <p>Office workers who coordinate meetings and events for elected or appointed officials.</p>
<p><b>4 (150)</b></p>	<p>Contacts are with individuals or groups within or outside the organization and involve persuading, advising, or presenting and justifying matters having substantial impact on the organization to obtain desired actions, to reach agreement and/or to resolve significant operating problems.</p> <p>OR</p> <p>Contacts are with high-level officials to provide subject-matter advice based on area of expertise, to agree on courses of action, or to solve difficult problems encountered in work assignments.</p>	<p><u>Guide</u></p> <p>Intended to cover interactions with others which involve responsibility for influencing others, who may have different views or objectives, to obtain desired actions, and/or working skillfully with others to resolve the more difficult operating/program problems. Contacts require considerable communications skills and perception, understanding, and evaluation of others' viewpoints, positions and opinions to resolve problems or reach objectives.</p> <p><u>Application</u></p> <p>Contacts involve the presentation and defense of important and possibly controversial matters in meetings and hearings, or the resolution of difficult problems. Examples are:</p> <p>Senior analysts who present findings and recommendations to elected officials in both the executive and legislative branches;</p> <p>Managers who meet with citizen groups to explain and justify County plans or actions.</p>



**FACTOR 6: CONTACTS (Continued)**

<b>Level (Points)</b>	<b>Definition</b>	<b>Guide/Application</b>
<b>5 (200)</b>	<p>Contacts are with high-level officials within or outside of the organization and involve presenting, justifying, or defending very important issues where diverse viewpoints, goals and objectives are strongly advocated and must be reconciled to achieve suitable alternatives or to arrive at acceptable positions.</p>	<p><u>Guide</u>            Intended to cover extremely difficult contacts of County-wide importance involving meeting and dealing with individuals or groups whose approval, participation, or agreement is vital to the effective administration of County-wide programs, functions or services. The worker represents the County Government and has authority to negotiate or make commitments or decisions concerning major policy or program matters.</p> <p><u>Application</u>            Limited to high-level County officials who interact with persons of equivalent level in other jurisdictions or government agencies, businesses or the community in formulating major County policies, programs or services, or contesting significant and complex legal matters in court.</p>

## FACTOR 7: PUBLIC SERVICE/ASSISTANCE

This factor refers to the worker's provision of direct assistance to the public and/or care and custody for a client population in providing public service, either in person or by telephone. This factor encompasses one-on-one assistance/care-giving or custody as well as similar responsibilities for groups of individuals. Consideration is given to the level of intensity and the duration of personal interaction required in providing the public service or assistance. ASSISTANCE TO OTHER COUNTY EMPLOYEES, INCLUDING EMPLOYEES OF OTHER COUNTY-FUNDED AGENCIES, IS CREDITED UNDER THE CONTACTS FACTOR.

NOTE: SEE DEFINITION FOR FACTOR 6: CONTACTS for the distinction between Public Service/Assistance and Contacts. CREDIT FOR INTERACTIONS WITH OTHERS THAT ARE OF A SIMILAR NATURE, PURPOSE AND LEVEL MAY ONLY BE CREDITED UNDER ONE FACTOR - EITHER CONTACTS OR PUBLIC SERVICE/ASSISTANCE.

Level (Points)	Definition	Guide/Application
1 (0)	Limited public service and assistance to clients and the public is required.	<u>Guide</u> Intended to cover work in which service to the public or immediate one-to-one assistance is limited. Work primarily supports or directs activities of other employees within the organization. This level includes work that may provide some public service, but such service is incidental to the primary purpose of the job; or work involves meeting with citizens or groups, but does not require providing direct public service or assistance on a one-to-one basis for a substantial amount of time. <u>Application</u> Workers who provide only limited public service or assistance such as file clerks, accountants, and mechanics; managers and supervisors whose assigned duties are primarily administrative or managerial and for whom hands-on public service/assistance is incidental to the purpose for which they were hired; program work that requires meeting or dealing frequently with the public to present information or to organize events but does not involve one-to-one assistance.
2 (90)	Personal assistance, care, and/or custody is provided to the public or clients (non co-workers) on demand. Assistance/service, which is usually immediate and of short duration, requires the employee to respond to readily recognizable needs.	<u>Guide</u> Intended to cover work in which requests for service or assistance are recurring and frequent. Assistance is normally of short duration and may involve referral to other individuals and/or agencies for final resolution. Needs of clients are normally readily identifiable or readily ascertained through asking predetermined questions of a checklist nature, and appropriate assistance can usually be rendered immediately. <u>Application</u> Workers who provide immediate assistance to many people on a daily basis.

**FACTOR 7: PUBLIC SERVICE/ASSISTANCE (Continued)**

<b>Level (Points)</b>	<b>Definition</b>	<b>Guide/Application</b>
<b>3 (115)</b>	Personal assistance and/or care of clients is provided on demand or on an on-going basis. Assistance/service requires questioning or interviewing clients in order to determine the appropriate assistance/service to be provided.	<p><u>Guide</u></p> <p>Intended to cover work that requires lengthy or detailed questioning of clients or investigation on behalf of clients in order to determine the nature of assistance/service required. Once the service needs are determined, assistance can normally be provided.</p> <p><u>Application</u></p> <p>Occupations which require the use of judgment in questioning others to identify the nature of assistance required, such as investigation to assist clients, client intake, community outreach, and library reference work.</p>
<b>4 (150)</b>	Professional assistance or care involving intensive counseling therapy is provided to clients. Assistance/service requires the employee to assess problems that are multi-faceted and typically of a psychological, physical, psycho-social, or socioeconomic nature requiring long-term treatment.	<p><u>Guide</u></p> <p>Intended to cover work requiring intensive interaction with individuals due to the nature of the problems involved. Intense or difficult inter-personal interaction with clients and client assistance requiring long-term counseling is involved.</p> <p><u>Application</u></p> <p>Professional therapeutic counseling to individuals with severe and complex problems which may require considerable follow-up.</p>

NOTE: **DETERMINING FREQUENCY:** Frequency of occurrence must be determined for the following factors:

- **Factor 8: Working Conditions**
  - 8a: Working Environment
  - 8b: Hazards
- **Factor 9: Physical Demands**

Frequency of occurrence refers to actual occurrence of the work characteristics or requirement and is determined as follows:

**Regularly Recurring**

The factor is present in the work **at least 50 percent** of the work time (based on an 8-hour work day, 40-hour work week).

**Occasionally Recurring**

The factor is present in the work **at least 25 percent** but less than 50 percent of the work time (based on an 8-hour day, 40-hour work week). It may occur periodically such as monthly, quarterly, or annually, or at irregular intervals. Note, however, that even if the factor is present less than 25 percent of the time, if the factor is **inherent** in the nature of the work, is an absolute and recurring requirement of the job which is documented in the class specification, and/or is a bona fide occupational qualification for recruitment, "occasionally recurring" credit may be given regardless of the time spent.

The letters "R" and "O" are used in the plan to designate the respective point value of Regularly Recurring and Occasionally Recurring.

**FACTOR 8: WORKING CONDITIONS**  
**FACTOR 8A: WORKING ENVIRONMENT**

This factor measures the discomforts or unpleasantness of the work environment. Frequency of occurrence is also considered.

Level (Points)	Definition	Guide/Application
<b>1</b> <b>(0)</b>	The work environment involves normal, everyday discomforts or unpleasantness. The work area is adequately lighted, heated and ventilated.	<p><u>Guide</u></p> <p>Intended to cover all normal work situations where workers encounter common everyday discomforts or unpleasantness. No special measures are necessary to control environmental conditions.</p> <p><u>Application</u></p> <p>Work in such places as offices or meeting rooms; or travel in commercial vehicles such as airplanes, trains or buses.</p>
<b>2</b> <b>(R=35)</b> <b>(O=25)</b>	The work environment involves minor discomforts or unpleasantness which typically are inherent in the work. Workers readily adjust to such conditions in order to perform their assignments. Conditions include annoying noise; vibrations from the operation of equipment; dust and grease encountered in maintaining and repairing equipment and facilities; exposure to human/animal body waste or body fluids, as when clinic personnel collect urine specimens; working outside in inclement weather; prolonged exposure to media attention, and providing office support services to an organization unit.	<p><u>Guide</u></p> <p>Intended to cover situations where workers are subjected to some unpleasantness or discomfort which must be tolerated, or which requires that some care be taken or special measures adopted to deal with conditions.</p> <p><u>Application</u></p> <p>Shop or laboratory conditions; work performed outdoors; data entry work; legislative staff work; clerical work in support of several professionals; directing on-site firefighting efforts.</p>
<b>3</b> <b>(R=45)</b> <b>(O=35)</b>	The work environment involves very disagreeable or unpleasant situations which are inherent in the work. Workers, who must accept such conditions, are often provided some means of ameliorating their effects such as uniforms, special clothing and cleanup facilities. Conditions include work involving exposure to sewage; working with very dirty or greasy equipment; working outside in conditions of high humidity; working in enclosed protective custody or similar environments.	<p><u>Guide</u></p> <p>Intended to cover situations where workers are subjected to noticeably unpleasant or discomforting conditions; or work in a correctional or similar facility subject to special security procedures.</p> <p><u>Application</u></p> <p>Very dirty shop conditions or work on equipment covered with grease and soil, work in sanitary landfills, or in a correctional facility.</p>

**FACTOR 8 A: WORKING CONDITIONS: WORKING ENVIRONMENT (Continued)**

<b>Level (Points)</b>	<b>Definition</b>	<b>Guide/Application</b>
<b>4 (R=60) (O=45)</b>	The work environment involves unusually disagreeable or unpleasant conditions due to the extreme nature of the situations. The conditions are inherent in the work and cannot be avoided. Conditions include fire suppression work where personnel must respond on a 24 hour basis in extremes of weather, heat, soil and grime, and may have to deal with the severely injured or death; and call takers/dispatchers who must respond quickly and accurately to calls from persons in emergency situations of a serious or life-threatening nature.	<u>Guide</u>  Intended to cover situations where workers are subjected to extremely unpleasant and discomforting conditions.  <u>Application</u> Work under very cold or very hot conditions such as front-line work fighting fires; responding to calls for emergency assistance in an emergency operations center.

FACTOR 8: WORKING CONDITIONS:

FACTOR 8-B: HAZARDS

This factor considers the risks or hazards present on the job. Use of special equipment and/or adherence to special procedures or precautions is required. Frequency of occurrence is also considered.

Level (Points)	Definition	Guide and Applications
<b>1 (0)</b>	The work presents no significant hazards to employees.	<p><u>Guide</u></p> <p>Intended to cover all normal work situations where workers encounter common everyday risks. No special measures are necessary to safeguard workers against injury.</p> <p><u>Application</u></p> <p>As defined.</p>
<b>2 (R=40) (O=30)</b>	The work involves hazards that require special procedures, safety precautions, and/or the use of special equipment, such as hard hats, respiratory masks, protective clothing, gloves; or work involves exposure to abusive, aggressive and unpredictable behavior from clients or the general public in a work location to which the public has unrestricted, open access; or work which requires home visits to provide a service. The hazards encountered may result in injuries or disease that typically can be controlled through proper safeguards and/or procedures.	<p><u>Guide</u></p> <p>Intended to cover situations in which workers are subjected to some risk. Care is taken or special measures adopted to deal with conditions.</p> <p><u>Application</u></p> <p>Work in which the worker may encounter threatening situations by conducting home visits or performing work in similar situations that could present a threat to workers; work requiring use of tools, equipment or machines that may cause injury; work requiring workers to work within close proximity to moving equipment; work requiring exposure to disease or toxic substances; or work directing on-site firefighting efforts or law enforcement efforts.</p>
<b>3 (R=65) (O=50)</b>	The work involves considerable risks which require use of strict safety precautions and procedures and/or the use of specialized equipment, such as, shields, ear protectors, insulated or protective clothing; exposure to contagious disease due to work with hazardous substances such as human/animal waste or bodily fluids; or visits to such places as personal residences or commercial establishments which are likely to provoke hostility or aggression toward the workers.	<p><u>Guide</u></p> <p>Intended to cover work requiring strict observance of safety precautions or procedures and/or the use of safety equipment to avoid injury to workers.</p> <p><u>Application</u></p> <p>Workers who process/test toxic substances or bodily fluids for highly contagious and life threatening diseases such as workers, in a medical environment, who conduct a series of tests of bodily fluids for HIV, hepatitis, or similar diseases or workers who have equivalent exposure to chemicals, disease, or toxic substances; labor and trades occupations whose customary work environment requires use of safety equipment in</p>

**FACTOR 8 B: WORKING CONDITIONS: HAZARDS (Continued)**

Level (Points)	Definition	Guide and Applications
		order to prevent serious injury; workers who encounter hostility or dangerous situations due to the nature and purpose of the work such as workers who visit residences or commercial establishments to enforce laws or to conduct investigations.
<b>4</b> <b>(R=90)</b> <b>(O=65)</b>	<p>The work involves <u>high</u> risk due to exposure to dangerous situations, such as working with explosives, radioactive substances, noxious gases or fumes; working at great heights; work subjecting the worker to physical attack or mob violence; or work fighting fires. The employee must apply a wide range of safety precautions.</p>	<p><u>Guide</u></p> <p>Intended to cover situations which present serious risk to workers. Careful use of safety equipment and special safety precautions are required to minimize possibility of injury.</p> <p><u>Application</u></p> <p>Climbing trees; providing security in a correctional facility; "front-line" work in law enforcement or fighting fires.</p>



## FACTOR 9: PHYSICAL DEMANDS

This factor covers the requirements and physical demands placed on the employee by the work assignment. This includes physical characteristics and abilities (e.g., specific agility and dexterity requirements) and the physical exertion involved in the work (e.g., climbing, lifting, balancing, stooping, kneeling, crouching, crawling, reaching, using quick and frequent hand/arm and foot/leg movements.) The frequency or intensity of physical exertion is also considered. Lifting and carrying of heavy objects (50 pounds and over) is assumed to be unaided.

Level (Points)	Definition	Guide/Application
1 (0)	The work requires ordinary physical effort to sit, walk, stand, bend, and reach or to carry light items.	<p><u>Guide</u></p> <p>Intended to cover all normal work situations where employees exert ordinary physical effort in carrying out their duties. Effort does not result in noticeable fatigue to workers.</p> <p><u>Application</u></p> <p>As defined.</p>
2 (R=35) (O=25)	The work requires long periods of standing or sitting in one position; walking over rough, uneven, or rocky surfaces; bending, crouching, stooping, stretching, reaching, or similar activities; lifting of objects from 20 to 50 pounds; rapid and sustained use of hands, fingers or arms; precise use of hands or fingers; on-going production-oriented operation of keyboard devices.	<p><u>Guide</u></p> <p>Intended to cover situations in which work requires light physical effort, which results in some fatigue.</p> <p><u>Application</u></p> <p>Operating a truck or similar vehicle; operating word processing equipment, computer terminals or other keyboard devices and VDTs where speed, accuracy, and volume of work are required for extended periods; parking meter repair; shelving and storing books, boxes, and materials; field work or visiting construction sites.</p>
3 (R=45) (O=35)	The work requires crouching or crawling in confined spaces, climbing ladders and scaffolding, or lifting of objects from 50 to 100 pounds; prolonged fine finger movement (i.e., data entry) or monitoring machinery or equipment (i.e., VDT screens); or sustained operation of buses and other large vehicles or construction equipment.	<p><u>Guide</u></p> <p>Intended to cover situations in which workers possess good strength and agility sufficient to exert medium physical effort in carrying out their duties. Effort results in noticeable fatigue.</p> <p><u>Application</u></p> <p>Labor and trades and materials handling jobs.</p>

**FACTOR 9: PHYSICAL DEMANDS (Continued)**

<b>Level (Points)</b>	<b>Definition</b>	<b>Guide/Application</b>
<b>4 (R=60) (O=45)</b>	The work requires climbing tall ladders, poles or ropes; lifting or carrying of objects over 100 pounds.	<u>Guide</u>  Intended to cover situations in which workers possessing above average strength and agility exert heavy physical effort in carrying out their duties. Effort results in considerable fatigue.  <u>Application</u> Fire fighting; climbing trees; performing heavy repairs on motorized equipment.

## FACTOR 10: SUPERVISION

This factor is only applied to classes that directly and on a continuing basis supervise the work of other regularly assigned workers, who may be paid employees or volunteers. A minimum of two work-years must be supervised for a class to receive credit under this factor, and two or more employees may not receive credit for directly supervising the same workers.

### SUBFACTOR 10A: SUPERVISION - NATURE OF WORK DIRECTION

This subfactor measures the responsibility of an employee for the work of others. It includes the supervisory functions of assigning and reviewing work, establishing and enforcing work standards, coordinating work efforts; and work planning, organization and control.

NOTE: Employees who direct volunteers or part-time, intermittent or seasonal workers who are non-career County employees receive Level 1 of this factor.

Level (Points)	Definition	Guide/Application
1 (50)	Supervises others in the performance of work by passing on or giving assignments or instructions to employees and checking their work; ensures that work rules and practices are observed, solves ordinary problems, ensures that materials, supplies, and equipment are properly used, that required work records are maintained, and that work is completed on time.	<u>Guide</u> Intended to cover situations in which workers, who may participate regularly in the work, provide work direction or lead supervision to others; and workers who direct the work of volunteers or non-career County employees.  <u>Application</u> As defined.
2 (85)	Assigns & reviews work; enforces work standards; solves ordinary problems encountered in the work; coordinates work within area; enforces unit policies; makes minor changes to work methods or procedures or to work stations, furnishings or equipment; prepares or reviews work records and reports.	<u>Guide</u> Intended to cover situations in which workers, who may participate in the work, <u>devote the majority of their time to supervising directly the work of others.</u>  <u>Application</u> Supervisors of a unit, section, function or program where <u>the primary emphasis is on directing the work of others;</u> first level supervisors.
3 (120)	Develops plans to implement approved work programs extending over one or two years; plans for and allocates resources to accomplish work programs; reviews work progress and recommends or takes actions to adjust work effort to meet objectives; approves purchases of equipment, materials and supplies.	<u>Guide</u> Intended to cover situations in which workers plan and control programs in a large or multifaceted organizational unit, and do not normally participate directly in the work themselves.  <u>Application</u> Workers who direct varied functions or organizational units and who have responsibility for planning and budgeting, and for changing work efforts to meet objectives; division heads.

**FACTOR 10: SUPERVISION EXERCISED: NATURE OF WORK DIRECTION (Continued)**

<b>Level (Points)</b>	<b>Definition</b>	<b>Guide/Application</b>
<b>4 (140)</b>	Coordinates overall planning of the organization's work programs over a one- or two-year cycle. Decides on own authority or in consultation with superior, on organizational structure, work methods and procedures, level of service, and resource requirements to accomplish work objectives. Resolves difficult problems of coordination among major County departments and outside organizations.	<p><u>Guide</u> Intended to cover situations in which workers, either on own authority or in consultation with a superior, decide on the work program of a department or equivalent organization unit.</p> <p><u>Application</u> Full assistant or deputy department heads.</p>
<b>5 (160)</b>	Approves work programs for a department or independent office. On own authority, decides or approves such matters as organizational structure, work methods and procedures, kind and level of service or product, and resources to accomplish work. Takes or directs actions to resolve major problems of coordination or to adjust work effort to meet objectives.	<p><u>Guide</u> Approves work programs for a department or independent office. On own authority, decides or approves such matters as organization structure, work methods and procedures, kind and level of service or product, and resources to accomplish work. Takes or directs actions to resolve major problems of coordination or to adjust work effort to meet objectives.</p> <p><u>Application</u> Department heads.</p>

## SUBFACTOR 10B: SUPERVISION - PERSONNEL AUTHORITY

This subfactor measures the degree of authority exercised by an employee over matters affecting the selection, assignment, performance appraisal, training, promotion, reward, transfer, suspension, discipline, or removal of employees, or the adjustment of employee grievances and complaints. The authority may be formally delegated or informally exercised, so long as its exercise is not simply the transmitting of instructions from someone else, or of a routine or clerical nature, but requires independent judgment.

Level (Points)	Definition	Guide/Application
1 (0)	Upon request, provides information, advice, or suggestions to a higher level for use in making a personnel decision or in acting upon a personnel matter.	<u>Guide</u> Intended to cover situations in which supervisors participate informally in the personnel decision-making process; workers have no formal authority to act upon a personnel matter.  <u>Application</u> Lead Workers
2 (40)	<u>Regularly participates</u> in or <u>recommends</u> decisions or actions on a <u>variety</u> of personnel matters, typically involving the selection, orientation, training, performance appraisal, leave approval, promotion, and transfer of employees; counseling of employees; minor disciplinary measures; adjustments of minor complaints.	<u>Guide</u> Intended to cover situations in which supervisors regularly participate in personnel decisions by formally recommending or initiating personnel actions.  <u>Application</u> First level supervisors and equivalent positions at other levels.
3 (80)	<u>Independently decides or acts</u> on a wide variety of personnel matters which are normally subject only to administrative review; recommends serious disciplinary measures and adjustments of informal or formal complaints and grievances.	<u>Guide</u> Intended to cover situations in which supervisors effectively decide on personnel matters affecting their employees by initiating and signing personnel actions.  <u>Application</u> Full assistant or deputy department heads, division chiefs, and equivalent positions at other levels.
4 (120)	<u>Reviews and approves</u> a wide variety of personnel decisions (or effectively recommends such actions, including serious disciplinary measures and the disposition of formal grievances.)	<u>Guide</u> Intended to cover situations in which supervisors approve the personnel decisions of subordinates.  <u>Application</u> Department or agency heads.

**SUBFACTOR 10C: SUPERVISION - NUMBER OF WORKERS SUPERVISED**

This subfactor credits supervisory classes for the number of workers supervised both directly and indirectly, whether paid, full-time or part-time, volunteers or similar categories of workers. To be credited, employees or volunteers supervised must be regularly scheduled workers. For all regularly scheduled workers, the hours worked are converted to full-time equivalent and credited as provided in the following chart.

<b>Level (Points)</b>	<b>Number of Employees Supervised (FTE)</b>
<b>1 (0)</b>	Fewer than 2
<b>2 (20)</b>	2 - 12
<b>3 (30)</b>	13 - 50
<b>4 (45)</b>	51 - 200
<b>5 (60)</b>	201 - 800
<b>6 (80)</b>	801 - 3200

FACTOR-POINT TABLE  
MONTGOMERY COUNTY GOVERNMENT

QUANTITATIVE EVALUATION SYSTEM III

	FACTOR	1	2	3	4	5	6	7	8	9
1.	Knowledge Required	255	295	345	415	510	635	815	1055	1400
2.	Supervisory Controls	75	90	115	150	200				
3.	Guidelines	75	90	115	150	200				
4.	Complexity	240	290	365	465	605	800			
5.	Scope & Effect	165	205	255	325	425	560			
6.	Contacts	75	90	115	150	200				
7.	Public Service/Assistance	--	90	115	150					
8.	Working Conditions									
	8A. Working Environment									
	Recurring	--	35	45	60					
	Occasional	--	25	35	45					
	8B. Hazards									
	Recurring	--	40	65	90					
	Occasional	--	30	50	65					
9.	Physical Demands									
	Recurring	--	35	45	60					
	Occasional	--	25	35	45					
10.	Supervision Exercised – 2 or more workers supervised									
	10A. Nature of Work Direction	50	85	120	140	160				
	10B. Personnel Authority	--	40	80	120					
	10C. Number of Employees	--	20	30	45	60	80			